2018 McCracken Conference

PROCESS AND RULES WORKING TOGETHER

McCRACKEN
FINANCIAL SOLUTIONS CORP.

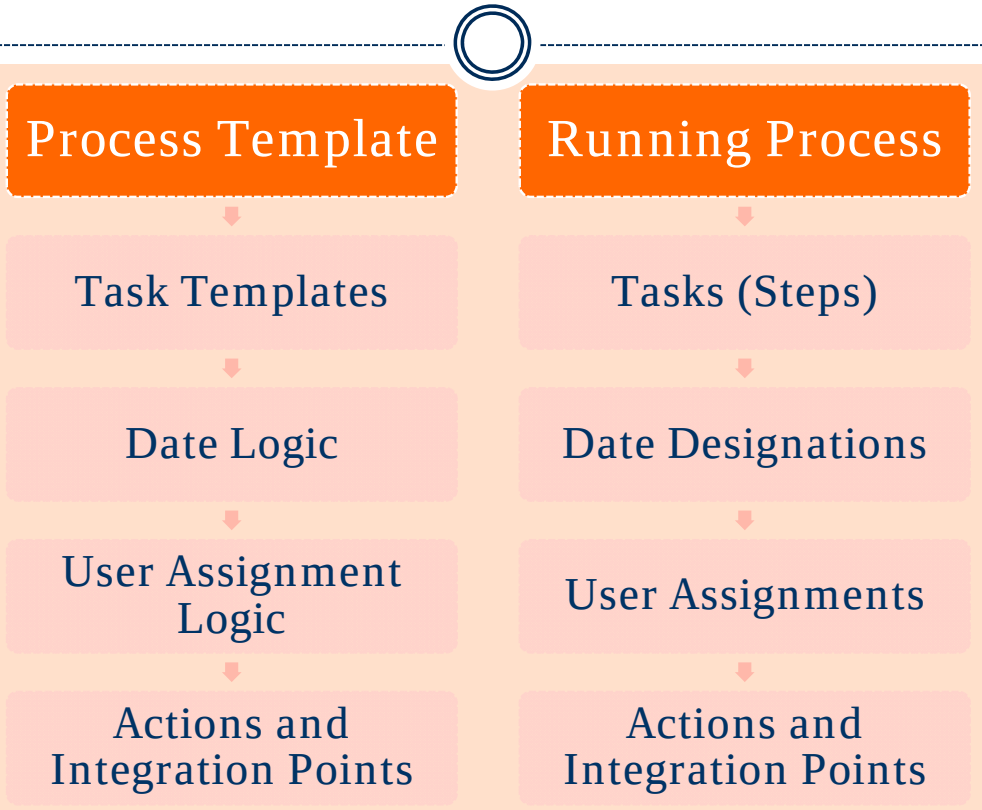
Process and Rules Working Together

THIS SESSION WILL TOUCH ON CONFIGURING PROCESS MANAGER AND THE RULES ENGINE TO AUTOMATE SERVICING AND ASSET MANAGEMENT ACTIVITIES

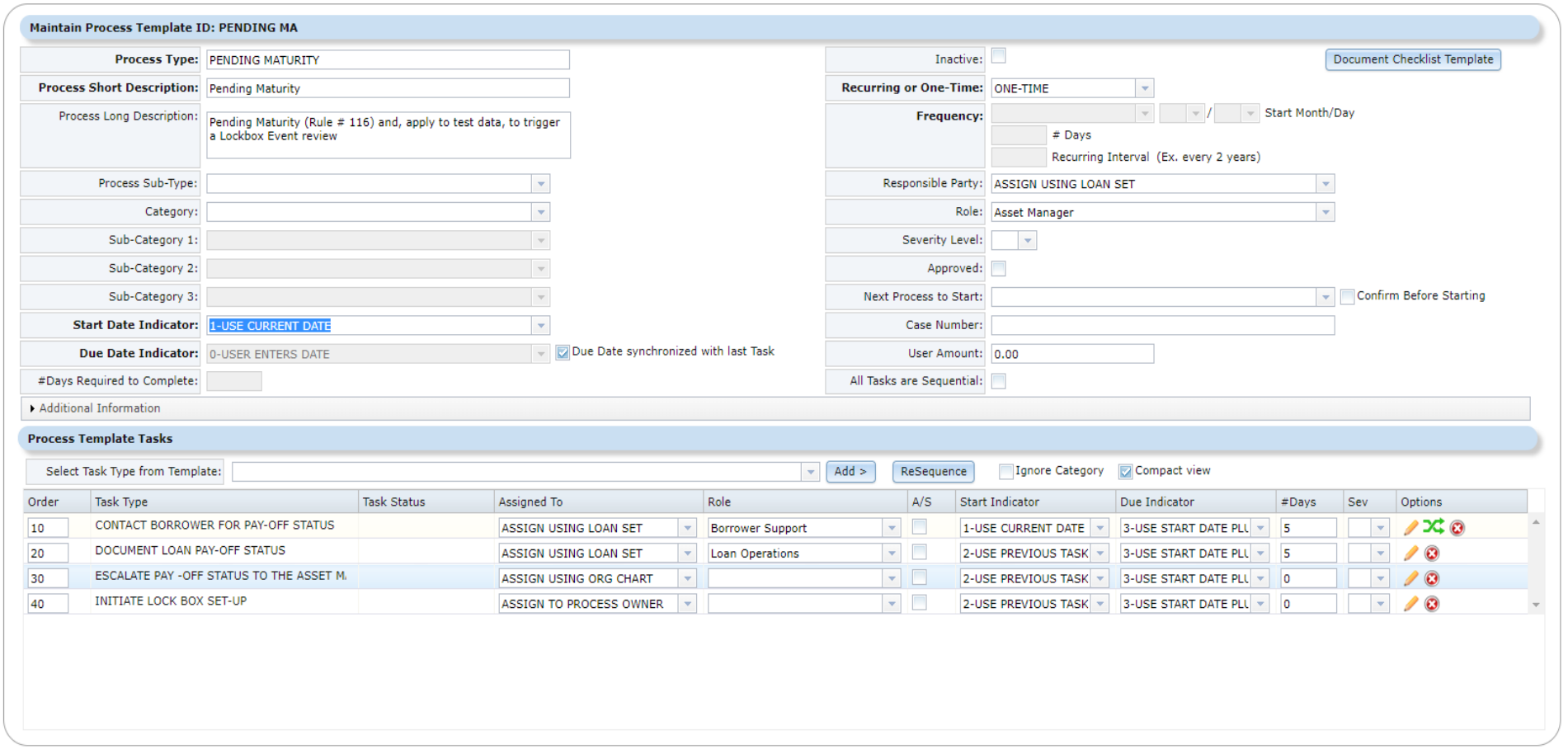
Agenda

- Process Definition
- Rule Set Creation and Execution
- Rule and Process Integration
- Financial Statement Tracking Example

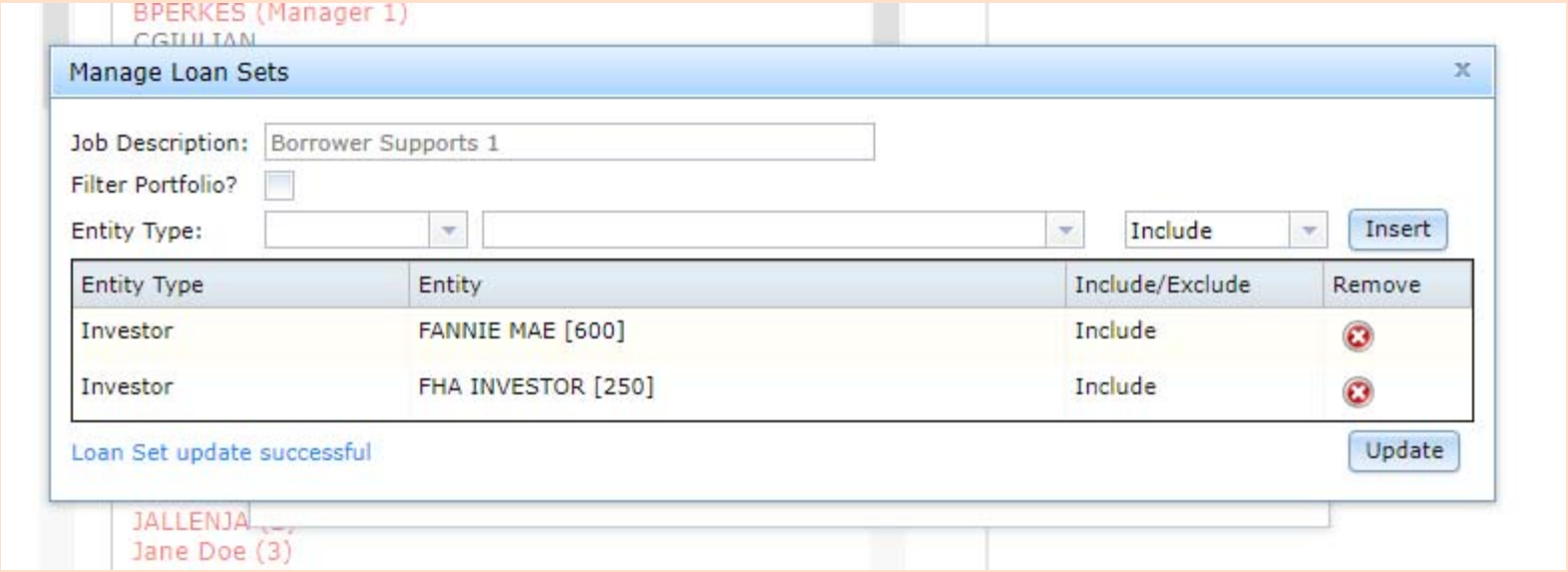
Process Definition



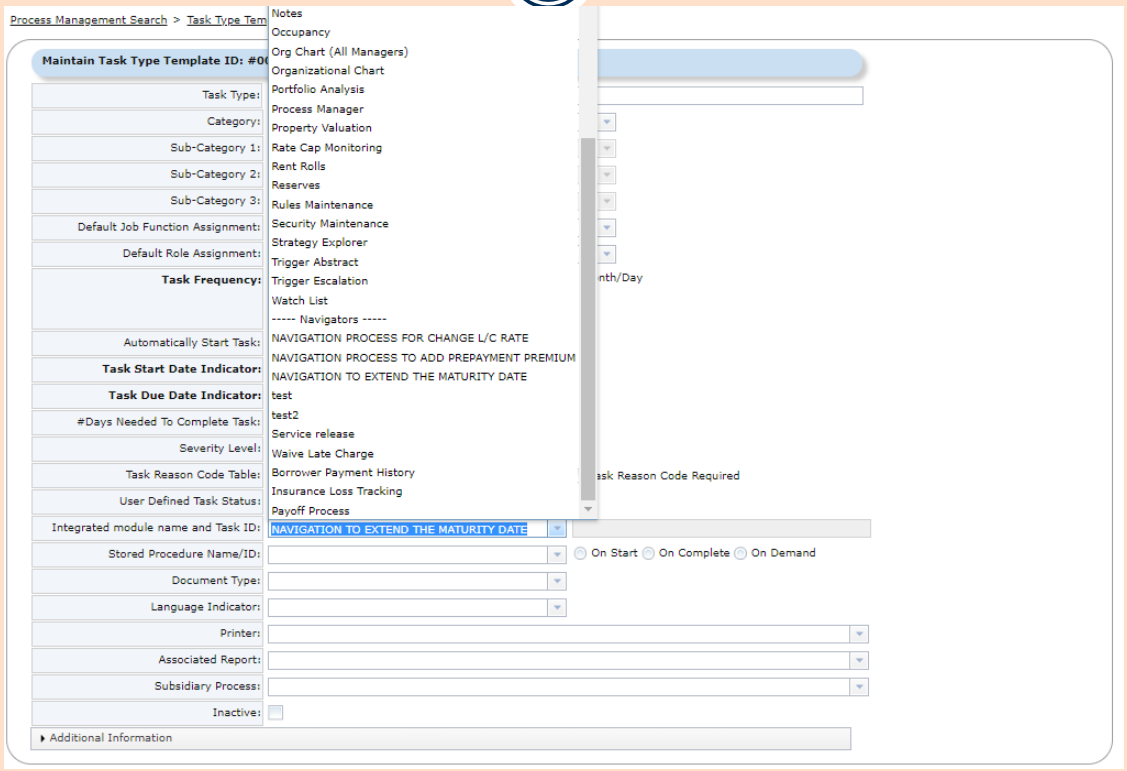
Pending Maturity Process Template



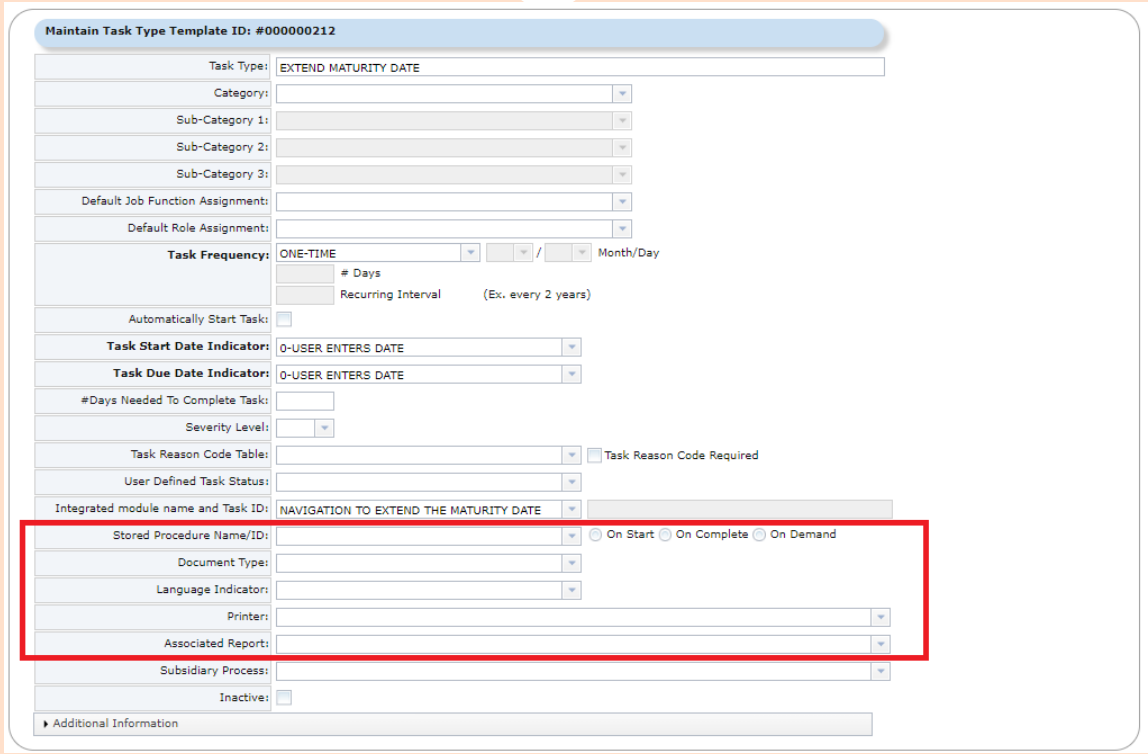
Loan Sets


BPERKES (Manager 1)
Manage Loan Sets
Job Description:
Borrower Supports 1
Filter Portfolio?
Entity Type:
Include
Insert
Entity Type
Entity
Include/Exclude
Remove
Investor
FANNIE MAE [600]
Include
Investor
FHA INVESTOR [250]
Include
Loan Set update successful
Update
Jane Doe (3)

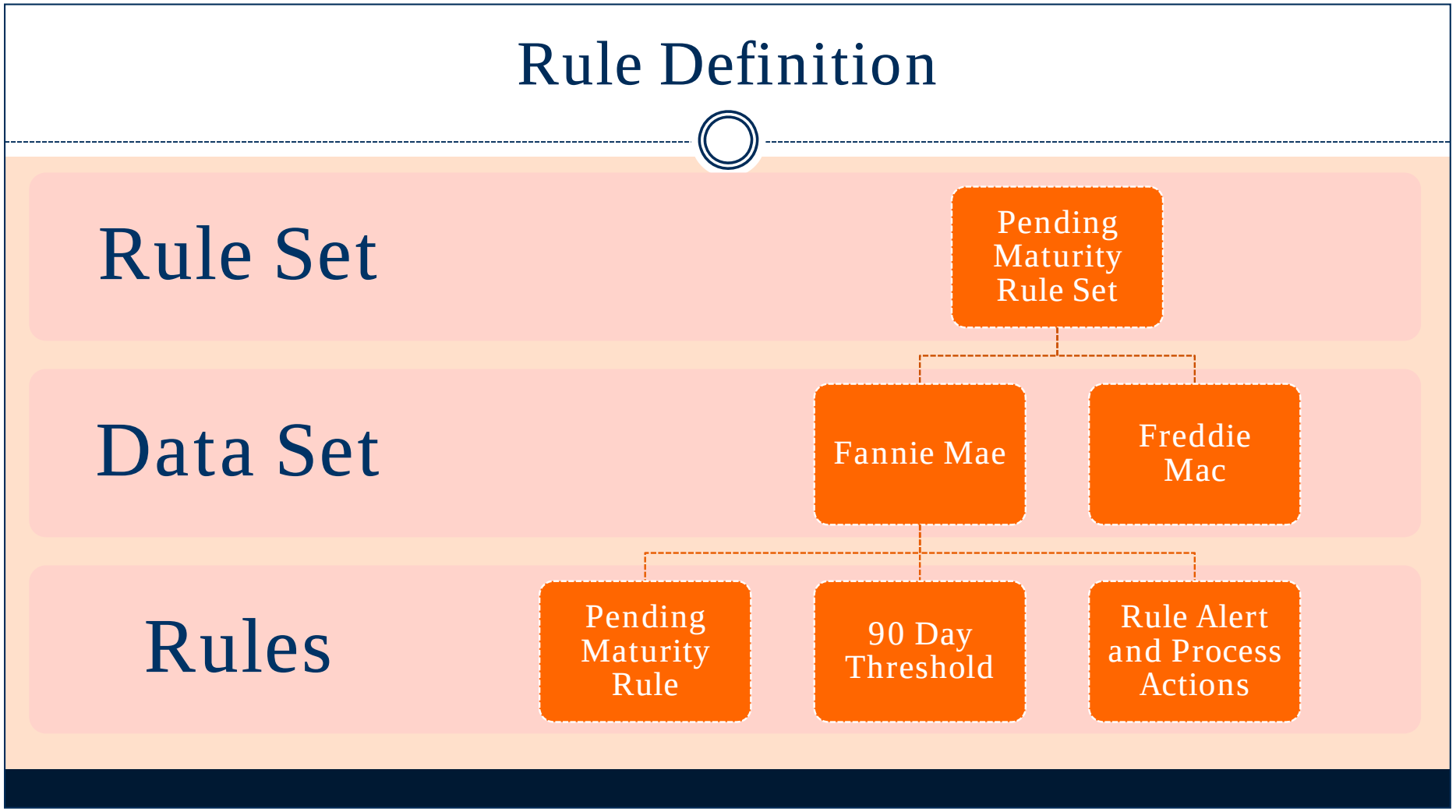
Task Integration



Task Actions

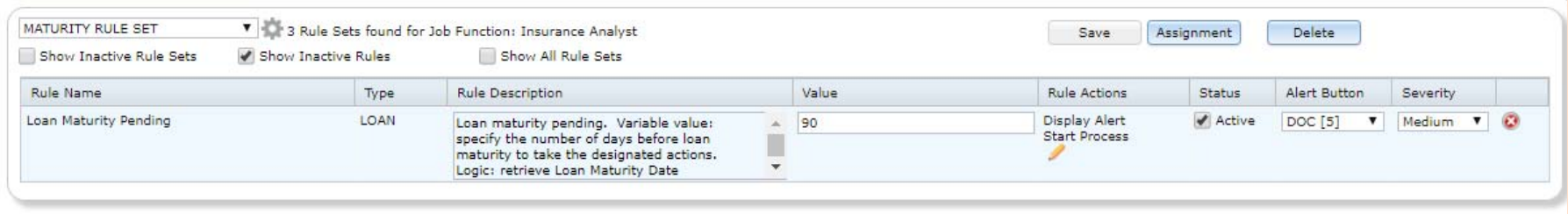


Rule Definition



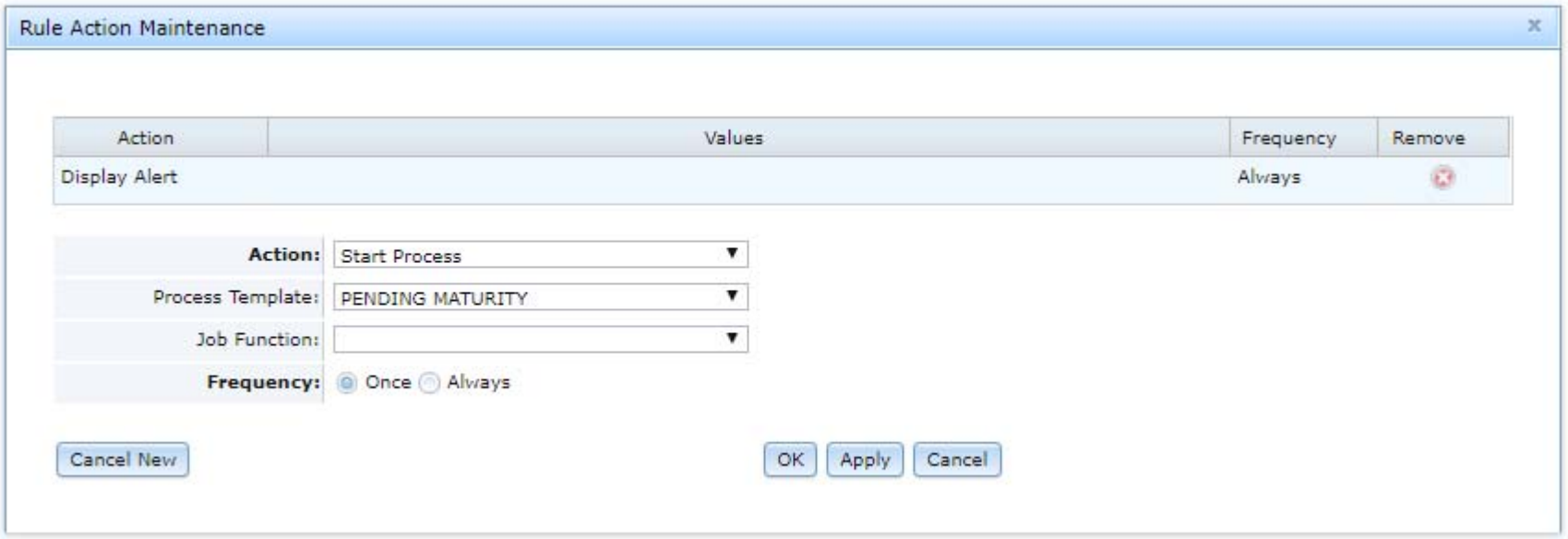
Rule Set

Define rules to be executed



Rule Actions

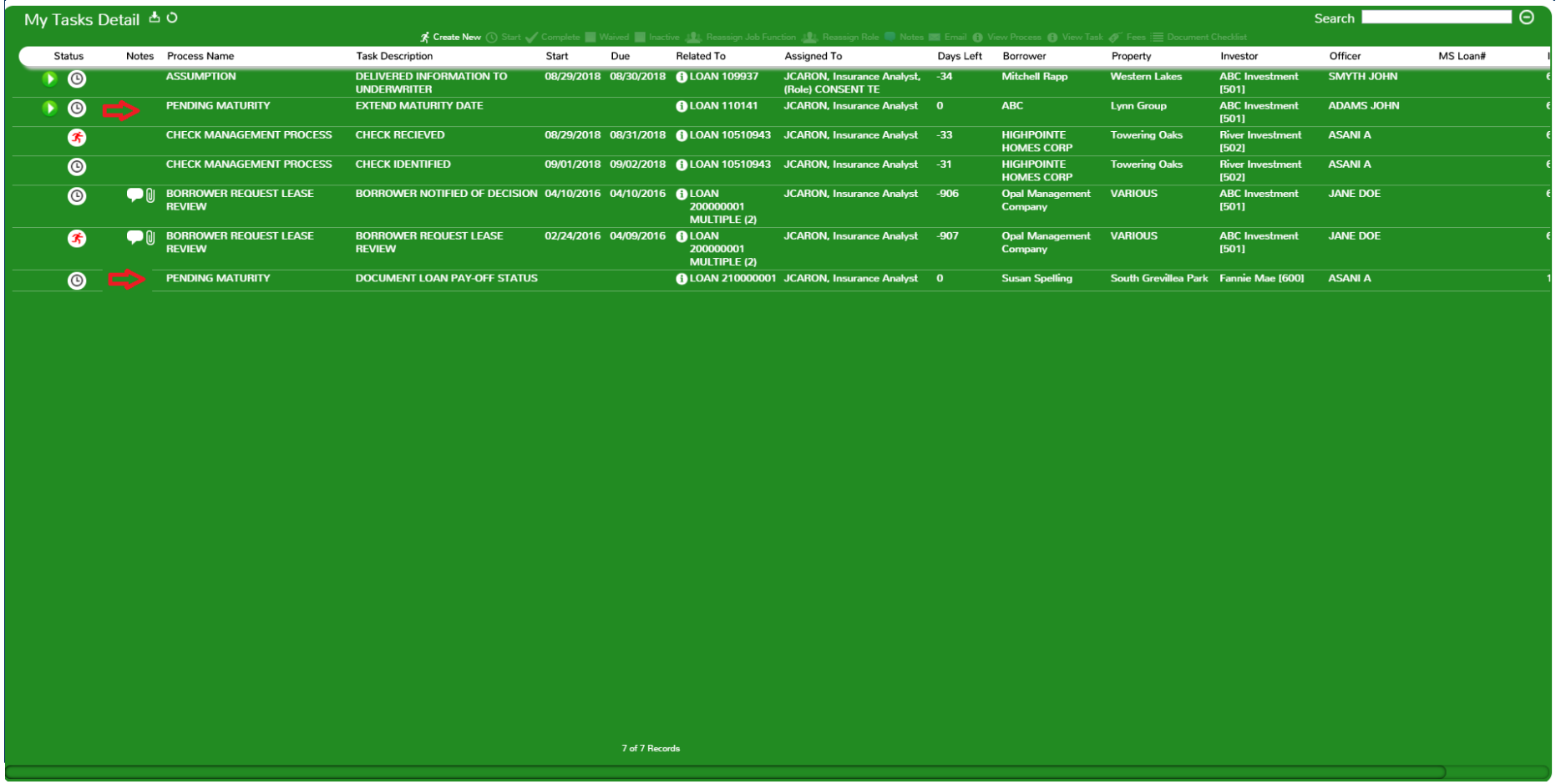
Specify actions taken when rule is tripped



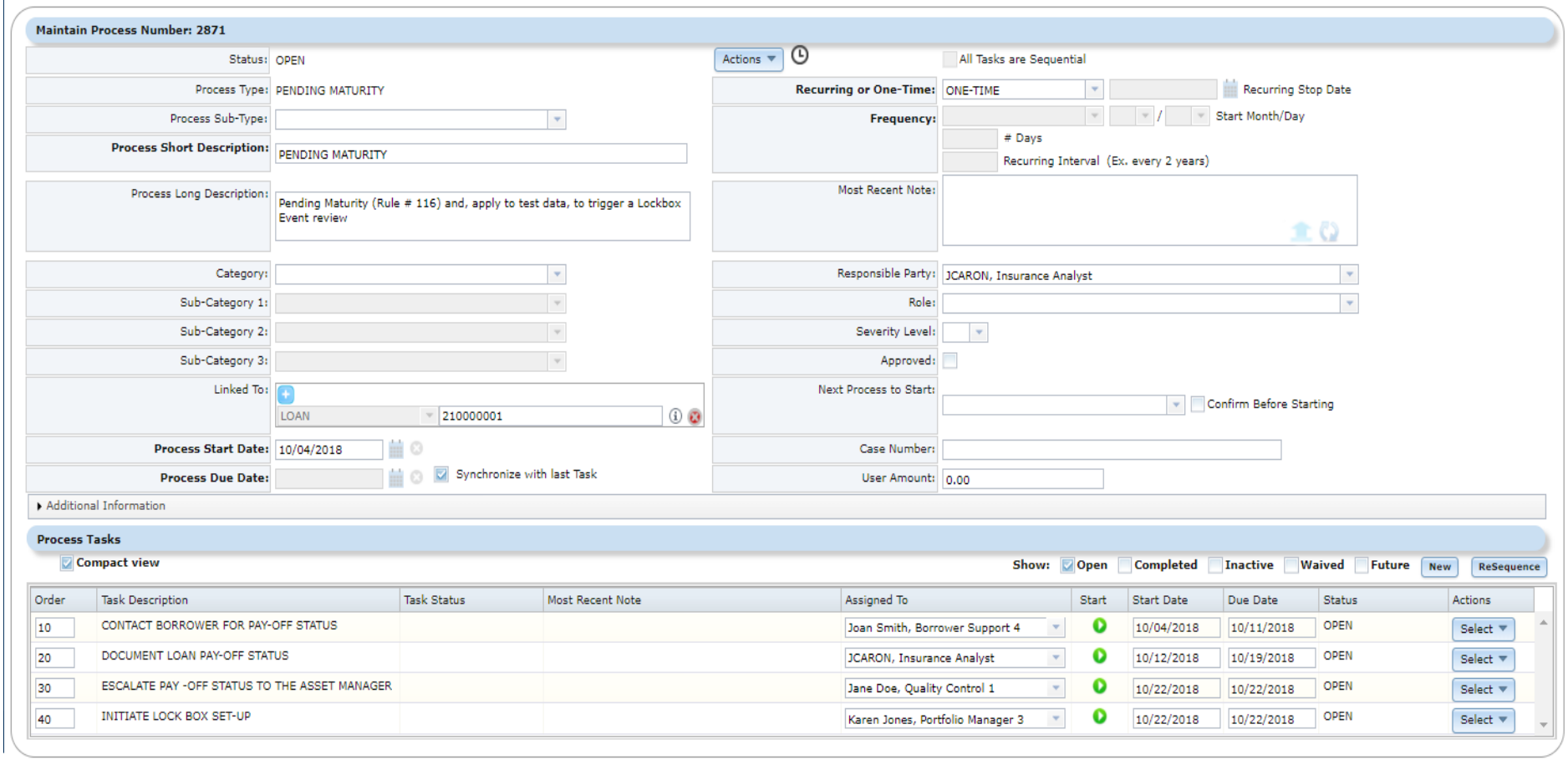
Rule Set Assignment

Define set of loans rule specification applies to

Task Queue


My Tasks Detail
Search
Create New
Start
Complete
Waived
Inactive
Reassign Job Function
Reassign Role
Notes
Email
View Process
View Task
Fees
Document Checklist
Status
Notes
Process Name
Task Description
Start
Due
Related To
Assigned To
Days Left
Borrower
Property
Investor
Officer
MS Loan#
ASSUMPTION
DELIVERED INFORMATION TO UNDERWRITER
08/29/2018
08/30/2018
LOAN 109937
JCARON, Insurance Analyst, (Role) CONSENT TE
-34
Mitchell Rapp
Western Lakes
ABC Investment [501]
SMYTH JOHN
PENDING MATURITY
EXTEND MATURITY DATE
LOAN 110141
JCARON, Insurance Analyst
0
ABC
Lynn Group
ABC Investment [501]
ADAMS JOHN
CHECK MANAGEMENT PROCESS
CHECK RECIEVED
08/29/2018
08/31/2018
LOAN 10510943
JCARON, Insurance Analyst
-33
HIGHPOINTE HOMES CORP
Towering Oaks
River Investment [502]
ASANI A
CHECK MANAGEMENT PROCESS
CHECK IDENTIFIED
09/01/2018
09/02/2018
LOAN 10510943
JCARON, Insurance Analyst
-31
HIGHPOINTE HOMES CORP
Towering Oaks
River Investment [502]
ASANI A
BORROWER REQUEST LEASE REVIEW
BORROWER NOTIFIED OF DECISION
04/10/2016
04/10/2016
LOAN 200000001 MULTIPLE (2)
JCARON, Insurance Analyst
-906
Opal Management Company
VARIOUS
ABC Investment [501]
JANE DOE
BORROWER REQUEST LEASE REVIEW
BORROWER REQUEST LEASE REVIEW
02/24/2016
04/09/2016
LOAN 200000001 MULTIPLE (2)
JCARON, Insurance Analyst
-907
Opal Management Company
VARIOUS
ABC Investment [501]
JANE DOE
PENDING MATURITY
DOCUMENT LOAN PAY-OFF STATUS
LOAN 210000001
JCARON, Insurance Analyst
0
Susan Spelling
South Grevillea Park
Fannie Mae [600]
ASANI A
7 of 7 Records

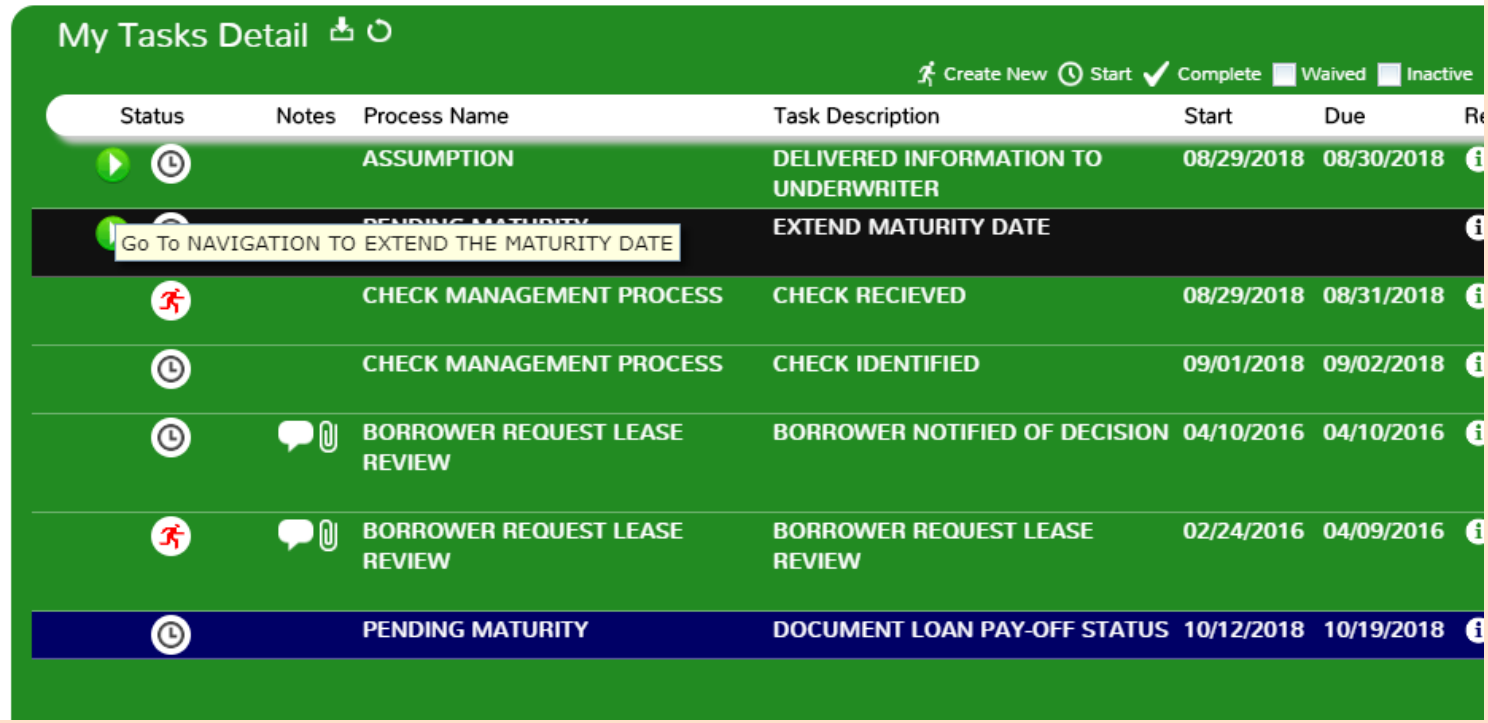
Running Process



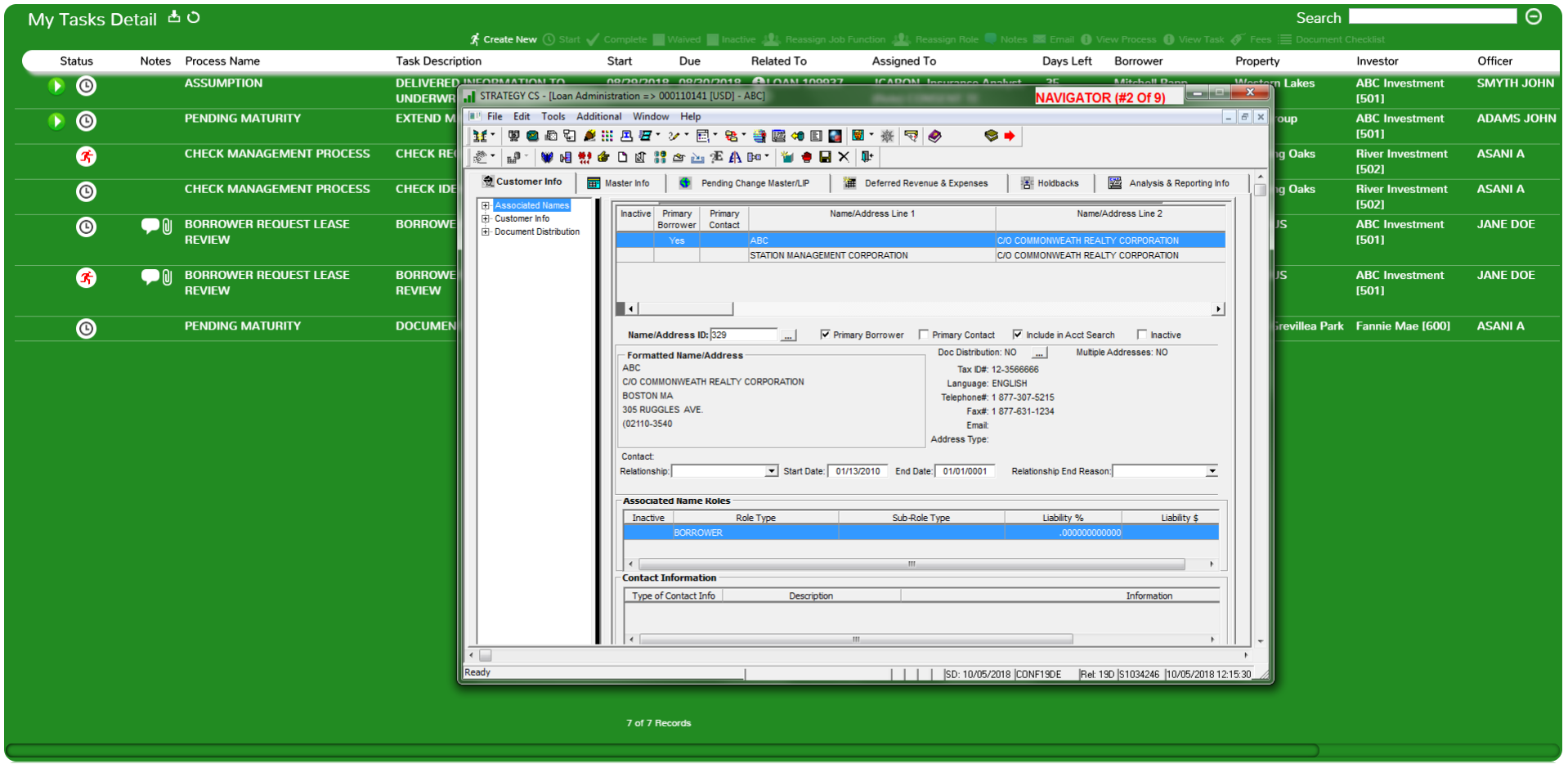
Driving Procedures With Process

- Integrate tasks with modules in both interfaces
  - Directs user to the appropriate place to do their work
  - Send loan number or collateral associated with the task to the selected module
- Integrate tasks with Navigator
  - Capture desktop procedures
  - Provide users with documentation
  - Improve training for new users and increase efficiency for experienced users

Task Linked to Navigation



Task Linked to Navigation



Financial Statement Tracking Example